



PATENT

IPW

-1-

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

In re application of:

James D. Peterson et al.

Application No.: 10/698,140

Filed: October 31, 2003

For: SYSTEM AND METHOD FOR
PROVIDING FINANCIAL ADVICE
FOR AN INVESTMENT PORTFOLIO

Confirmation No.: 2938

Group No.: 3628

Examiner: Unknown

**SUBMISSION OF POWER OF
ATTORNEY BY ASSIGNEE**

353 Sacramento Street, Suite 2200
San Francisco, CA 94111
Telephone: (415) 772-4900
Facsimile: (415) 398-2890

Commissioner for Patents
P.O. Box 1450
Alexandria, VA 22313-1450

Sir:

Enclosed for filing please find a duly executed Power of Attorney by Assignee for the above-identified application which specifies an Assignment recordal date of October 31, 2003, at Reel 14670, Frame 359, and shows Assignee's entire right, title and interest to establish ownership.

Respectfully submitted,

STALLMAN & POLLOCK LLP

Date: July 21, 2004

By: 
Brian J. Keating (Reg. No. 39,520)

Attorneys for Applicant(s)



IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

In re Patent Application of

James D. Peterson et al.

Application No.: 10/698,140

Filed: October 31, 2003

For: SYSTEM AND METHOD FOR PROVIDING
FINANCIAL ADVICE FOR AN INVESTMENT
PORTFOLIO

Confirmation No.: 2938

Group Art: 3628

Examiner: Unknown

**POWER OF ATTORNEY BY
ASSIGNEE**

Commissioner for Patents
P.O. Box 1450
Alexandria, VA 22313-1450

Sir:

CHARLES SCHWAB & CO., assignee of the entire right title and interest in the above-identified application by assignment dated 10/30/2003, 10/27/2003 and 10/28/2003, which assignment was recorded in the Patent and Trademark Office on October 31, 2003, at Reel 14670, frame 359, hereby appoints the practitioners associated with the Customer Number below as attorney(s) and/or agent(s) to prosecute this application and transact all business in the Patent and Trademark Office connected herewith:

CUSTOMER NO.: 28584

Please direct all correspondence regarding this application to the following:

STALLMAN & POLLOCK LLP
Attn: Brian J. Keating
353 Sacramento Street, Suite 2200
San Francisco, CA 94111

Telephone: (415) 772-4900
Facsimile: (415) 398-2890

Dated: 7/15/04

CHARLES SCHWAB & CO., INC.

By: 
Name: Yusuf Cassim
Title: Vice President & Associate General Counsel